## *Contents*

# 1 Login

Login with your Username and Password at sms.contactnow.co.za

The Number of credits in your account are in red in the bottom left corner.



# 2 Account Settings

You can change the following information here:



1. **Change your password:**
   Enter the new password in the designated Password and Confirm Password box. Click "Update Account". (A Username cannot be changed).

2. **Contact Information:**
   Name, email and contact details.

3. **Time Difference:**
   International accounts, are able to apply/adjust the relevant time difference.

4. **Low Credit Warning and Reporting:**
   Remove or change the amount at which Low Credit Warnings and Summary Reports are sent at, as well as the email they are delivered to.

5. **Forward replies to mobile or email:**
   Incoming messages, or replies, from sent SMS's can be directed to a specified mobile number (cost of 1 credit per reply) OR a specified email address (no cost).

6. **Send response to reply:**
   Set an automatic response to all received replies (1 credit deducted per response)

7. **Forward data to URL:**
   Sent messages and replies can be forwarded to a website. Technical support is available to assist in the setup of this.

# 3 Online Payments

The fastest way to add credits to an account is via "Online Payments" using a credit or debit card. This is a totally secure website transaction.

- "Enter Number of Credits to buy" in the designated box.
- Click "Continue to payment page" and proceed as directed.

> *EXAMPLE*
>
> 500 credits will be charged at 0.27c per SMS credit, excl. VAT.
>
> 1 credit = 1 SMS

ContactNow

# 4   Maintain Groups

It is important to start here by creating the number of required groups, more groups can be added at any time. Groups allow for the storage and easy retrieval of contact information.

Example: Friends, Customers, Sales Team etc.

1. Enter the desired "Group name" and "Group description". Both fields are compulsory.

2. **Sub-Accounts:**
   Allow for the sharing of a specific group with another user, permitting Sub-Account holders to send SMS's as well. Sub-Account holders can hold either "Read" access, or "Write" status, which allows them to write SMS's.

(See Sub-Accounts for more info)

3. Click "Create Group" (The group has now been cre-ated)

4. Created groups are displayed below.

   - The displayed group summary contains the name of the group, the description of the group and the num- ber of contacts in the group.

   - "Numbers" displays the total number of mobile phone numbers in the group.

   *EXAMPLE*   47 Downloaded = 47 mobile phone numbers

5. Group Name, Description, and Sub-Accounts can also be edited. Simply Click "Edit" of the relevant group.
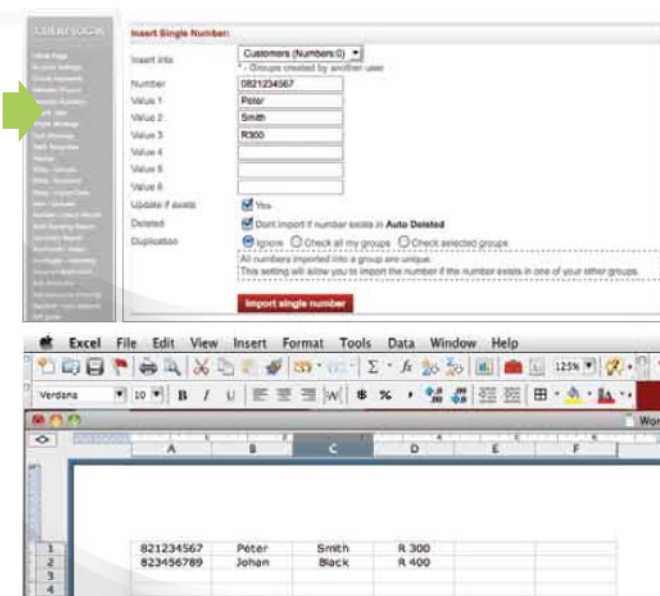
6. **Share Group with Sub-Accounts:**
   Sub-Accounts with "Read" status are able to view but not edit the group, while Sub-Account holders with "Write" status are able to edit the group.

7. **Deleting Groups:**
   Click the box above "Edit" of the relevant group. Click "Delete Selected".

8. **Exporting groups to Excel:**
   Click "Download".

9. Viewing Main Account groups is only possible if Sub- Accounts have been allocated "Read" or "Write" status.

# 5   Import Numbers

**INSERT SINGLE NUMBER**

1. **"Insert into":**
   Select the group into which the single number must be added.

2. Enter mobile number into designated "Number" box.

3. **Optional:**
   Enter Value 1 – Value 6 (Column B to Column G in the Excel Spreadsheet) if additional information is required. (See Bulk Import, for more on Values)

4. **Update if exists:**
   Will update an existing mobile number with new values/information.

5. **Duplication:**
   ContactNow will automatically delete any number that is duplicated in the same group when importing data.

   - **"Ignore":**
     Select if it is unnecessary to verify that a mobile number appears in other groups.

- **"Check all my groups":**
  To determine if a mobile number appears in any other groups

- **"Check selected groups":**
  Search for a mobile phone number within selected groups.

### BULK IMPORT (PREPARING YOUR FILE):

Import data from an Excel workbook. It is important to save an Excel file as CSV (Comma Delimited)

Prepare a spreadsheet in Excel with mobile numbers in column A. Additional data pertaining to the mobile numbers can be added in columns B to G.

Note: To be uploaded the data in the spreadsheet must start from row 1, column 1. The first column (A) must contain mobile numbers only. These numbers can be written as 0831234567, 27831234567, 831234567, or

### SAVE YOUR EXCEL FILE AS A CSV (COMMA DELIMITED) FILE:

1. In the Excel file containing the contact information, select "File" and "Save As".

### TEXT DOWNLOAD FORMATS:

Data can also be imported by means of NotePad, found under Accessories in Microsoft.

1. Mobile numbers must be entered as the first field in the file. Mobile numbers can be written as 0831234567, 27081234567,831234567, or "27831234567"

2. Separate the data columns with commas. Up to 7 separated data fields separated by commas are allowed.

6. **"Deleted":**
   If selected, mobile numbers will not be imported if it appears on the Auto Delete list (see Blacklist/Auto Delete)

"27831234567". Columns B to G can be used for any addition information pertaining to the contact person. Allowing for personalised bulk SMS's.

Example: Dear Peter Smith we thank you for your donation of R300. Dear Johan Black we thank you for your donation of R400 (see Create SMS Template)

2. "File Name"; rename the file (optional), under "Save as Type": select CSV (comma delimited).
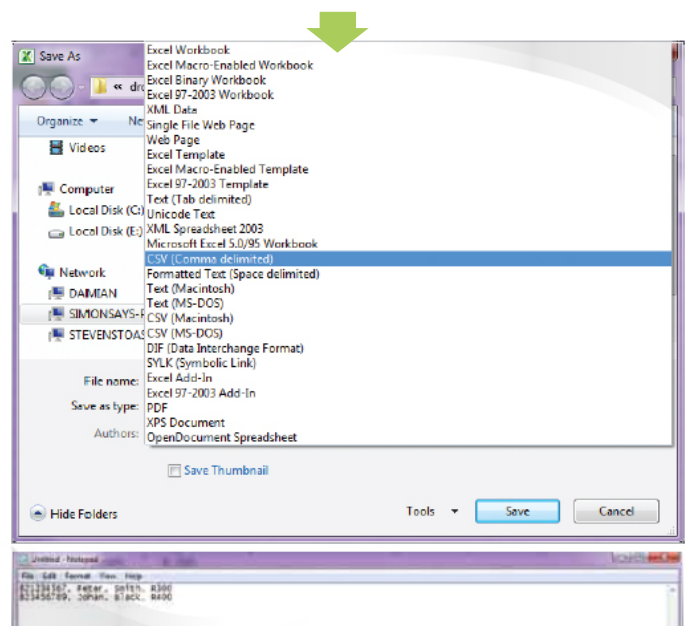
**HOW TO IMPORT FROM A FILE:**

Once the data has been set up in one of the above formats it can be imported.

1. Select Group to which data must be imported. If the group at contains data, the new data will only be added. (It will not overwrite the group's current data).

2. Browse for the relevant file to import. Double click this file and the window will close.

3. Select the "File type" you wish to import. Select Excel, CSV or Text.

4. Duplication: ContactNow will automatically delete any number that is duplicated in the same group when importing data.

   - **"Ignore":**
     Click this if it is unnecessary to verify that a mobile phone number appears in other groups.

   - **"Check all my groups":**
     This will determine if a mobile phone number ap- pears in any other groups.

   - **"Check selected groups":**
     This will search for a mobile phone number within selected groups.

5. Click "Bulk Import from File".

6. "Upload and import complete" will pop up when the task is complete.
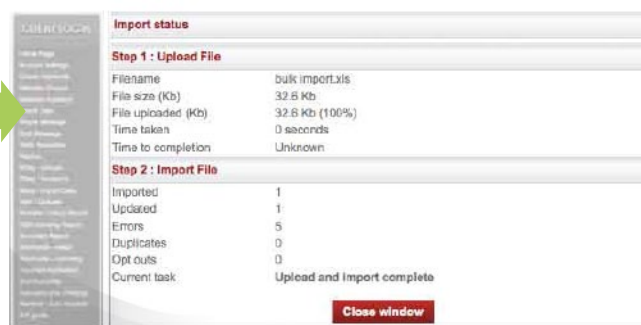
7. Imported: Total amount of mobile numbers imported into the group.

8. Updated: Any new values imported into a group pertaining to an existing mobile number will see the new values added to the existing mobile number entry, instead of creating a duplicate entry within the group.

9. Errors: The amount of incorrect mobile numbers or any entry where no mobile number is available. These are not imported.

10. Duplicates are counted but not imported.

11. Opt outs are counted but not imported. This refers to individuals who have requested their mobile numbers be removed from all databases.

# 6   Maintain Numbers

**VIEW NUMBERS IN GROUP:**

1. Select a specific group or leave to default to all groups.

2. Enter the desired mobile number as the search criteria of the "Search Filter" (add 27 in front of the mobile number), click "Search Data" and all the available in- formation will be provided. Or leave the search criteria blank to view all numbers or all numbers in a selected group.

3. Select 'DISPLAY' to view all values added when im- porting data.
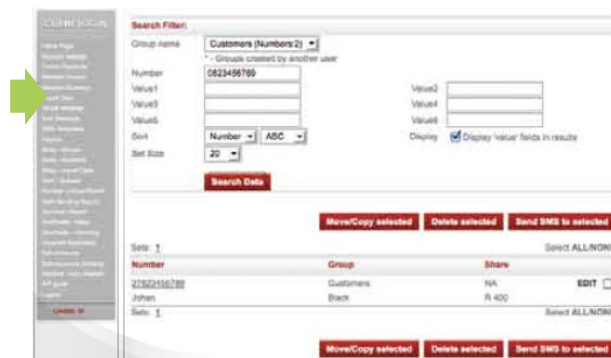
> *EXAMPLE*
> Value1 could hold the client name, assist in identifying the mobile number.

4. Sort: Entries can be sorted by Number or Value, in Ascending (ASC) or Descending (DESC) order.

5. Set Size: Determines the amount of entries displayed per page (20, 50 or 100).

6. Entries are listed below the Search Filter area.

**EDIT NUMBERS:**

Each contact can be edited individually, by clicking "EDIT"
next to the relevant number.

**Delete Numbers:**

Contacts can be deleted individually. Simply select the relevant number and click "Delete selected".

**Send SMS's to selected numbers:**

The 'SELECT ALL' or 'NONE' function will assist users in working with data and identifying individuals to contact.

**Move/Copy numbers in a group:**

1.  Select identified numbers to move/copy from a group.

2.  Click "Move/Copy Selected".

3.  Select Action ("Move" or "Copy") and group.

4.  Choose to "Update" or "Ignore" the contact if it exists in another group.

5.  Click "Copy/Move data".

> *IMPORTANT*
>
> The set size can be fixed to 20, 50 or 100, to assist when sending to select contacts. It is important to select the relevant numbers on each page/set and send the SMS's immediately. Moving to the next set will not carry over previously selected numbers, they will be unselected.

# 7   Send single SMS

**TO SEND A SINGLE SMS:**

1.  Go to "Single Message".

2.  Set the date and time. If left at default, the SMS will be sent upon clicking 'Send Messages'!

3.  Enter the mobile number in the designated "TO" box.

4.  Enter the message in the designated "MESSAGE:" box. 1 SMS consists of 160 characters (1 credit) while 440 characters are the maximum available per message sent (This translates to 3 SMS's = 3 credits). Or add a previously created template. (See Create SMS Templates).

5.  **Replies:**

    - **Forward to mobile:**
      Enter the mobile number to which replies should be directed (cost = 1 credit per reply)

    - **Forward to Email:**
      Enter the email address to which replies should be forwarded. (No Cost). Replies are automatically forwarded to ContactNow as well.

    - **Send Response:**
      To send an automatic response to all replies, type the necessary text in the designated text area. (1 credit deducted per response)

6.  **Flash message:**
    The SMS will immediately open on the mobile phone. It is not saved to inbox. (Cost = 1 credit).

7.  **Campaign name:**
    Messages can be grouped under a "Campaign Name" for easier filing and reporting.

8.  To send a complete SMS, click "Preview SMS" to view the final message. Click "Send Messages" to release SMS's or "Close" to edit the message further.

# 8   Send bulk SMS

**TO SEND A BULK SMS:**

1.  Go to "Bulk Message".

2.  Select the relevant Group or Groups. (Groups can also be selected from Sub-Accounts, if Read/Write status has been assigned)

3.  **Time:**
    Select Send Now, Send Later, or Send Between

    - **Send Now:**
      The message will be send as soon as "Send Message" is selected.

    - **Send Later:**
      Provides the option to send a message on any date at any time. Identify both the date and time the message should be sent in the space provided.

    - **Send Between:**
      Useful when sending a large volume of messages which invite the receiver to make contact with the sender. Staggering the outgoing messages helps regulate the incoming calls in response to the message.

4.  Type the message in the designated "Message" box. 1 SMS consists of 160 characters (1 credit) with a maximum of 440 characters available per message, which translates into 3 SMS's or 3 credits.

**3 OPTIONS**

- A. Type a message that will be identical when sent to all contacts or;

- B. Select a Template created prior to sending or;

- C. Create a Template using the Placeholder Values. (See Create SMS Templates)

5.  **Replies:**

    - **Forward to mobile:**
      Enter the mobile number to which replies should be directed (cost = 1 credit per reply)

    - **Forward to Email:** Enter the email address to which replies should be forwarded. (No Cost). Replies are automatically forwarded to ContactNow as well.

    - **Send Response:**
      To send an automatic response to all replies, type the preferred reply in the designated text area. (1 credit deducted per response)

6.  **Flash message:**
    The SMS will immediately open on the mobile phone. It is not saved to inbox. (Cost = 1 credit).

7.  **Campaign name:** Messages can be grouped under a "Campaign Name" for easier filing and reporting.

8.  To send a complete SMS. Click "Preview SMS" to view the final message. Click "Send Messages" to release SMS's or click "Close" to edit the message further

# 9   Create SMS Templates

This is a useful feature for sending routine SMS's. Set up SMS content in "SMS Templates" and save. A Template drop down menu will now be available on both the Single SMS and Bulk SMS pages, from which the appropriate Template can be selected, adapted and send. If preferred, personalised information can be inserted into the message by making use of Placeholders. Placeholders insert the imported information from Column B (Value 1) to Column G (Value 6).

**Placeholders:**

| | |
|---|---|
| Value 1 = Column B | Value 4 = Column E |
| Value 2 = Column C | Value 5 = Column F |
| Value 3 = Column D | Value 6 = Column G |

**HOW TO CREATE A TEMPLATE USING THE ABOVE IMPORTED EXCEL VALUES:**

1. Go to "SMS Templates".

2. Type the desired message in the designated "Tem- plate" box.

Example: Hi (click on Value 1 to insert Column B information) (hit space) (click on Value2 to insert Column C information) (hit space) thanks for donating R (click on Value3 to insert Column D information). The text box will read: Hi @@value1@@ @@ value2@@ thanks for donating R@@value3@@.

3. Click "Create Template".

4. Each contact's personal information will automatically replace the inserted values, allowing for personalised bulk SMS's. When sent the SMS will read: "Hi Peter Smith thanks for donating R300" and the next "Hi Johan Black thanks for donating R400".

5. Before sending click "Preview" to view the first contacts personal information inserted into the message.



# 10 Sent / Queued

The results of sent SMS's can be viewed on this page.

Simply select the Date the message was sent, select the Campaign name (if applicable), Select "Include groups in Reports" to view the groups that were sent to.

Click "EXPAND", a list of options will appear. Select either "View" or "Download Excel 2007" alongside the relevant item on the list.

- Status **"DELIVERED"**:
  Successfully delivered to the Networks.

- Status **"UNKNOWN"**:
  The contact is listed under an unknown number, not recognised by the networks.

- Status **"EXPIRED"**:
  In 24 hours the system was unable to deliver a SMS due to connection problems or a mobile phone that has been switched off.

- Status **"UNDELIVRD"**:
  Messages were not delivered.

- **Replies:**
  Displays all messages returned on sent SMS's.

- **Opt outs:**
  Lists any contacts who have replied "stop", "no" or "delete" to a sent SMS, choosing not to receive any further messages.

**Cancel Messages**

- While SMS's are waiting to be processed click "Pause Messages".

- Click "Cancel" to delete SMS's (or click "Release" to send the paused SMS's)

# 11  Number Lookup

This tool allows for a search of individual mobile numbers and their SMS history. Select the relevant date range, enter the required mobile number and click "Generate re- port". A report containing all SMS's previously sent to this number will be displayed in an Excel document.



# 12  Replies

All replies are automatically stored under this menu option.
Replies can be sorted by Date, All, Read or Unread re- plies. Other search criteria include Campaign name, From number, and specific Words. To easily identify the sender include Values 1 to 6 by clicking "Include Sent detail", and click "Search". Once the SMS has been delivered, the receiver has 7 days to reply.

**Blacklist Selected:**
Mobile numbers can be directly blacklisted from this page, based on their replies.

**Download Replies:**
Sort and download replies.

# 13  Blacklist / Auto Delete

Numbers are automatically added to a blacklist if a contact replies with STOP, REMOVE, UNSUBSCRIBE, or other similar words or swear words to any SMS.

To search blacklisted contacts enter the mobile number (add 27 in front of mobile number), Campaign name, date

or message content. Contacts can manually be added to the Auto delete list individually or in bulk. These numbers will be deleted from the database. Should the same number be imported in future it will automatically be deleted.

# 14  Sub-Accounts

**Sub-Accounts:**
Create an account for another user and allocate the nec- essary credits from the Primary account. Provide the full name of the Sub-Account holder and assign a Username and Password and click Create Sub-Account.

**Edit Sub-Account:**
Click "EDIT" on the relevant Sub-Account listing to change the Password, Full name or Time Difference, as well as to activated or deactivate the Sub-Account.

**Sub-Account Credit Allocation:**
To allocate credits to a Sub-Account enter the number of credits in the designated "Amount" box. Add a Note for reference purposes (optional) and click "Update Credits".

NOTE

Confirm available credits on Primary account credit stock before allocating credit.

**Require Authorisation:**

Apply this function to ensure messages composed by a Sub-Account are authorised by the Primary account before being released. These messages can be viewed in Sub-Accounts (Holding) on the menu, and action taken to "Release" or "Decline" SMS's.

**Maintain Groups:**

When creating a group, the option exists to make the group available to a Sub-Account holder as "Read Only" or "Write". The Sub-Account holder is also able to create groups and allocate "Read Only" or "Write" status to the Primary Account holder.

# 15  B-Day Groups / B-Day Import

**BIRTHDAY MESSAGES:**

Sent to contacts automatically. A short User Guide is available upon request.

**Creating a birthday group:**

1.  Select "B'day group" from the menu bar

2.  Enter a group name and group description.

3.  Type the desired message in the designated "Group Message" box.

4.  Select the preferred time for the SMS to be sent out each day.

5.  To receive replies, enter the mobile to which replies should be directed. (Cost = 1 credit per reply)

6.  Select "Create group".



**SETTING UP DATA IN EXCEL SHEET:**

Birthday data must be imported in the following order:

Column A: Mobile number. Column B: Date of birth.
Column C: The numerical value of the month of birth. See diagram below.

Any additional information can be added in the columns that follow (Address or email address).

Save the file, once all the necessary data has been included.

Import the birthday data into the already created group.

To Import data select "B'Day – Import Data" followed by "Select Bulk Import",

a new screen will appear (see below) and complete the required fields.



Save the file, once all the necessary data has been included.

Import the birthday data into the already created group.

To Import data select "B'Day – Import Data" followed by "Select Bulk Import", a new screen will appear (see right) and complete the required fields.

**Insert into:**
Select the newly created birthday group.

**File to upload:**
Browse for and select the birthday data excel sheet.

**File type:** Select the File type the data is saved as (CSV or Excel).

Select "Bulk Import from file".

All data will now be imported into the selected group.

1. An "Upload and import complete" message will ap- pear when the task is complete.

2. **Imported:**
The total amount of mobile numbers imported into the group.

3. **Updated:**
The number of contacts previously in the group, which received new values/information when importing the new data file.

4. **Errors:**
Identifies the number of incorrect mobile numbers, these are not imported, nor any row that does not contain a mobile number.

5. **Duplicates:**
These entries are counted but not imported

6. **Opt outs:**
Contacts which have requested to be removed from all databases are **counted but not imported.**

Birthday Messages are now setup and will be sent to con- tacts automatically, as scheduled.

# 16  Logout

To leave a "session" click "logout", to prevent unauthorised persons from accessing account data or sending unauthorised SMS's.